

FSC-131-A

7/22/96

**SUBJECT:** New Partners Tracking Analysis/Selling Application - 'Ptrack' No Input Required (AutoMagic!) Plus New Enhancements!

**DISTRIBUTION:**

<u>X</u>	AVP	<u>X</u>	KAM	DM
<u>X</u>	RSM	<u>X</u>	AM	ELM
<u>X</u>	RBM	<u>X</u>	Reg.Mil./DF Mgr.	MIL
<u>X</u>	ROM	<u>X</u>	AE	DF
				REP

A new Excel-based software application has been developed to enable Field Sales Managers with NoteBook PC's to request 'Plan A' Direct Account Partners Tracking Data DownLoads. The new version replaces the previous RJR ToolKit application. This will be run inside the RJR ToolKit, replacing the previous version of Partners Tracking '96. It allows users to request specific Ship-To account data through AIM function T06, and generates a file which is sent back to the user via E-Mail. This file can then be automatically loaded into the PTrack application on the user's PC (locally) and creates a complete analysis & presentation tool (up to 7 printed pages). Some special handling is necessary when requesting PTrack download files for McLane, requiring two requests for each house (In-House & Out-House). Please call (contacts) for details.

This program is designed to provide field sales with a tracking / reporting and selling tool for use with our 'Partners' wholesale customers. It uses the most current available customer sales volume data (updated weekly) to calculate share tracking and to create output reports which show program performance, and projections. The goal of using this application is to maintain an open and productive dialog with our 'Partners' accounts for the purpose of pushing program results to a Win-Win outcome for all parties. The graphics help to provide a high-quality presentation of program performance and payment rates, to date, throughout the Partners program period, and allow for sales managers to work out performance and payment projections based on achievement of higher levels in category III. The new DownLoad feature eliminates user input, saving time and avoiding potential keystroke errors ; and each time a direct account download file is requested (from T06) it can be saved with the same name, which replaces previous files and also ensures that any historical data changes (resubmissions) are made current for the Sales user.

User Instructions Follow :

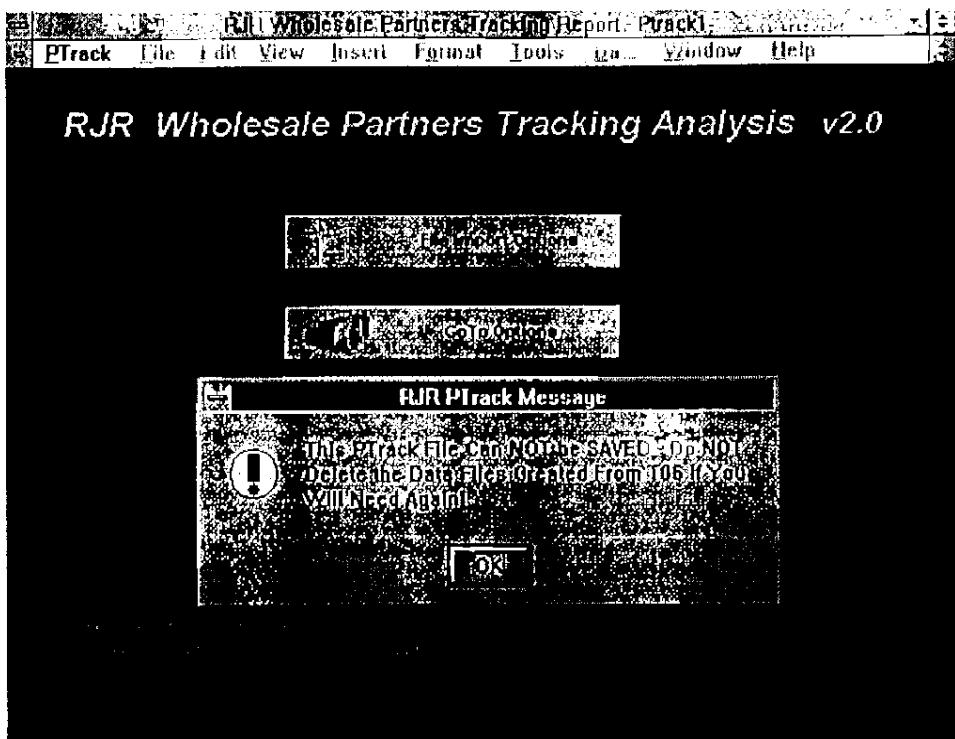
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## **New 'PTrack' - User Instructions :**

- Print this document - It is your manual for this version of Partners Tracking (ver. 2.0).
- Use AIM function **T06** to request PTrack data for specified 'Plan A' direct account from the mainframe. Use the **F4** (Dwnld) function key to request the Data DownLoad (instead of selecting a print report)
- This will execute your request and send a download file to your PC via E-Mail
- After processing, you will receive an E-Mail message with an attached Excel file during your next connection through X-Net communications (reports only)
- After connecting to receive E-Mail, Open E-Mail, and Open the downloaded letter - Do Not open the attached file. Print the E-Mail letter (may want to use as cover sheet on PTrack printout report)
- Click on **Attachment** , **Save** (or on the Save Attachment toolbar button) to save the data file to your **C:\Data\Excel\WPartner\Ptrk** SubDirectory. Be sure to name the file accordingly (ie: "Name.xls") and send it into the correct directory folder ... (**C:\Data\Excel\WPartner\Ptrk**), during the Save Attachment process. Remember - the file name (with '.xls' extension) and the SubDirectory location are critical. (Note: Saving Attachments is slightly different for those on the LAN-based MS-Mail system).

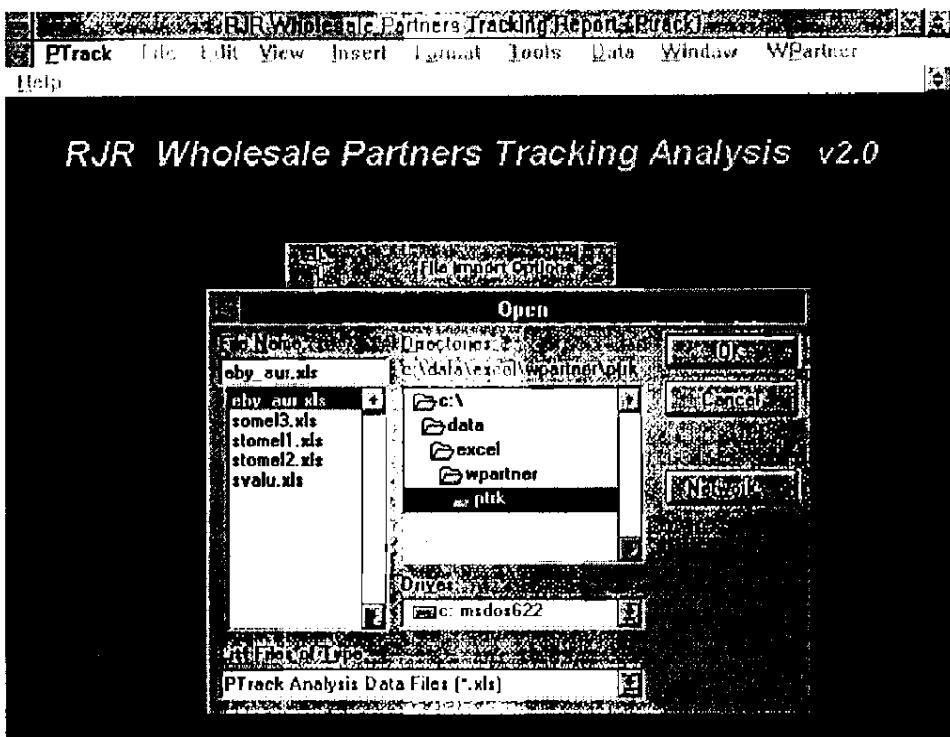
## **To Run 'PTRACK' :**

- Run **RJR Tools** from your RJR ToolKit Icon in Windows.
- Click on **RJR** , then **CatPro Tools**
- Select **Wholesale Partners** under Trade Programs from the ToolKit Menu
- Click on **WPartner** in the menu bar
- Click on **Create Worksheet** from the drop-down under Wpartner
- Click on **PTRACK96\_2** to execute the new PTrack program
- This will start the application and present you with the following screen :

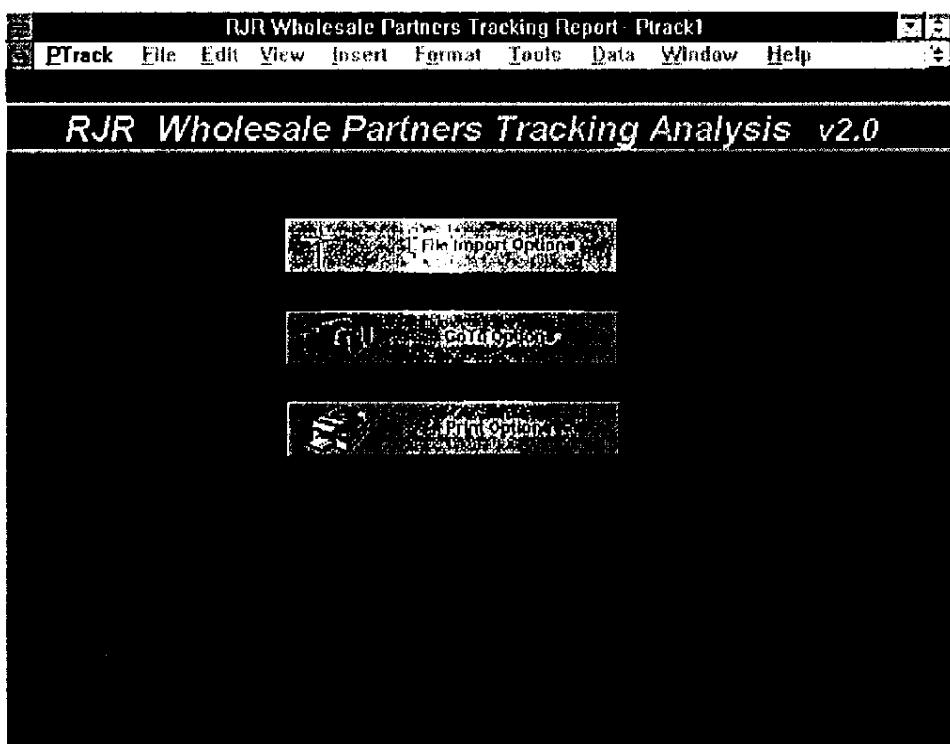


- The message implies that you will Not need to save your PTrack files, since you have already saved the data file (downloaded from the Mainframe & sent via E-Mail) into your WPartnerPtrk SubDirectory.
- Wait for PTrack to automatically run the File Import option, which displays your data files, and lets you select a file to run. These files are the ones which you have received via E-Mail (as described above) and have been properly Named and Saved into your working Ptrk folder.
- Select the file you wish to run (presented automatically by the File Import option) and Click on OK to execute PTrack, as shown below :

Note : Excel takes over at this point and populates your reports (3-5 seconds)

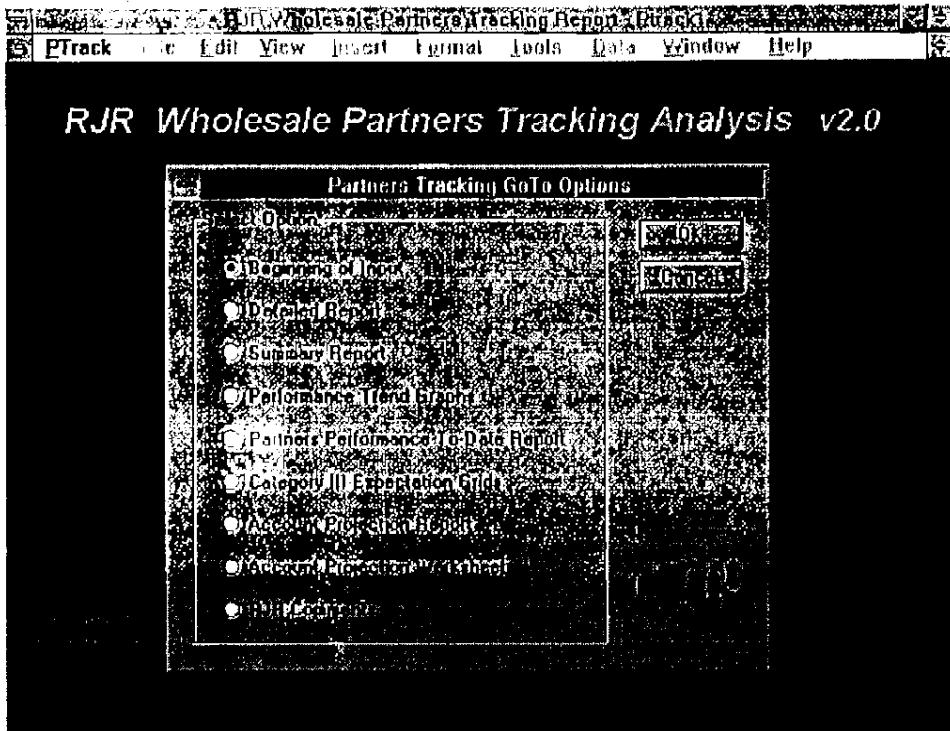


- Use the On-Screen Buttons to work with PTrack. GoTo and Print Options are self-explanatory, simply click and go :

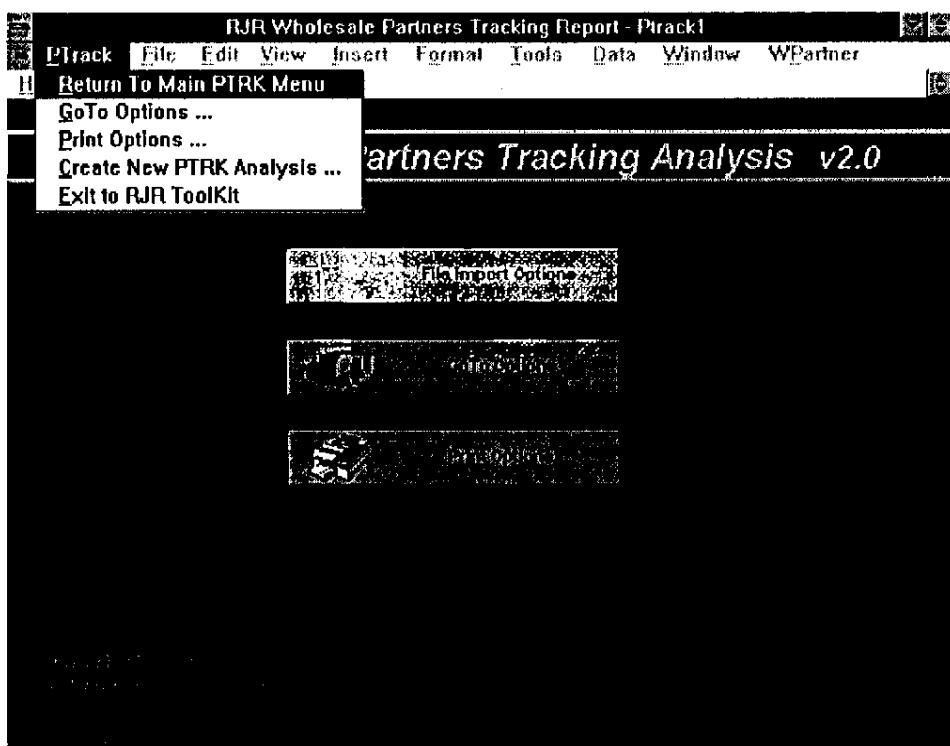


- Use GoTo menu options to input customer descriptions, RJR comments, etc.
- These are your GoTo Options (Print Options are similar):

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- There are also some Menu Options which drop down, under the PTrack Menu item which add some flexibility and ease of use, as well as the ability to run new PTrack files and/or to Exit the application (try them) :



That's it ! PTrack is automatic once your T06 files are sent down and saved into the correct directory folder on your PC. You can request mainframe updates through T06 any time. The AIM partners tracking data is updated weekly, and you can simply replace existing files with the new ones (same filename) as we move through the 6-month Partners program period. Each time a DownLoad file is requested it will be updated (versus previous runs) with any new or historical data which is available.

New Enhancement : [ Projecting additional carton sales needed to achieve next levels ]

Try the new Account Projection Report and the Account Projection Worksheet features, to encourage efforts from your direct accounts to shoot for higher performance results in Category III. Use the PTrack GoTo & Print Options to work with Partners program projections. They may be closer to next-level performance grids than they think.

We hope this application saves you time and improves your ability to leverage the power of Wholesale Partners with your customers.

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R. J. REYNOLDS TOBACCO COMPANY

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To: Duszynski, R, Myers, Keith, McMahon, Todd, Ridge, Robert, Burrows, Robert, Westenberger, R, Keeney, David, Jurgensen, Kurt T., Leonard, John M., Kight, Earl, Callaghan, Stephen W., Eckardt, Diane C.  
From: 1610 - Buffalo ROU (BRZEZIE)  
Posted: 7/22/96 17:02  
Opened: 7/22/96 17:02  
Subject: FWRD: FSC-131-A/New Partners Tracking A

forwarding the following. any questions, please advise....

===== <Forwarded Letter> =====

From: rjrwss/rjrpo3/davisc4  
To: 1610  
Subject: FSC-131-A/New Partners Tracking Analysis  
Posted: 07/22/96 13:25  
Priority: Normal

[[ FSC131A.DOC : 2139 in FSC131A.DOC ]]

CC: Macleod, Stephen, McPartlan, Amy

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